

Assurity®

Social Media

Strategy Guide



Social media is the way the world communicates, shops and builds relationships.



In fact, 72 percent¹ of Americans use some sort of social media and that figure is growing by the day.

Social selling, the practice of targeting, prospecting and building relationships on social media, presents a massive opportunity for you to get ahead of the curve and differentiate yourself online.

This guide will provide you with easy tips and strategies to take your brokerage's social media strategy to the next level and earn business online. You'll learn how to prospect on social media sites, approach potential clients and attract top talent to your business. Let's get started.

In this guide:



Why social media?

3



Questions to ask yourself

4



Opportunities by platform

5



Keys to social selling

12



**Prospecting and recruiting
online**

13



Best practices

16



**Tips for starting
a conversation**

18



Tools to help you succeed

20

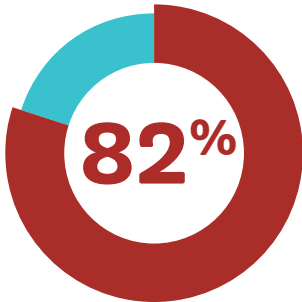
Why social media?



More than ever, social media is where the world meets – and as sales professionals, you know the importance of being where the prospects are. How important will social media be to sales in the coming years?

Consider these facts:

78% of sales pros using social media perform better than their peers.²



82% of potential prospects can be found on social media.²



30% of agents say lead generation is their biggest challenge.³

Millennials use social media for an average of **2 hours and 38 minutes** each day, and **Gen X** use it for an average of **1 hour and 49 minutes**.⁴



Clients are using social media, and the interactions they have there have serious bearing on whether they make a purchase. Don't wait for customers and recruits to come to you—look for them where they're spending their time.

Questions to ask yourself



How do you start your brokerage's social media strategy? Or if you already have one, how do you get the most out of it? Like most endeavors, you'll want to begin by figuring out where you are now.

Consider the following questions:

Am I using social media to reach my audience — clients and recruits?

What is the best way to strengthen my social media presence?

How am I measuring my goals?

How strong is my social media presence right now?

Am I leveraging the connections of my agents or management team?

Am I paying attention to comments and engaging with my network?

Am I asking for introductions or referrals?

If you're like most people, you've probably already noticed a few areas for improvement — and that's okay. **It's important to identify a starting point and places you can strengthen your social media presence.**

Opportunities by platform



Each major social media platform has different types of users. That may sound obvious, but by learning the potential clients and prospects that use each platform you can **gain valuable insight into your audience.**



Facebook is the largest social media site in the world and still growing. It has the broadest reach of any social media platform – **69 percent of US adults use it** – and it’s great for reaching a wide and diverse range of people.



It’s the most-used platform among all US adults, no matter their ethnicity, gender or location.¹

64% of people say they’d rather **message a business on Facebook** than call or email.⁵

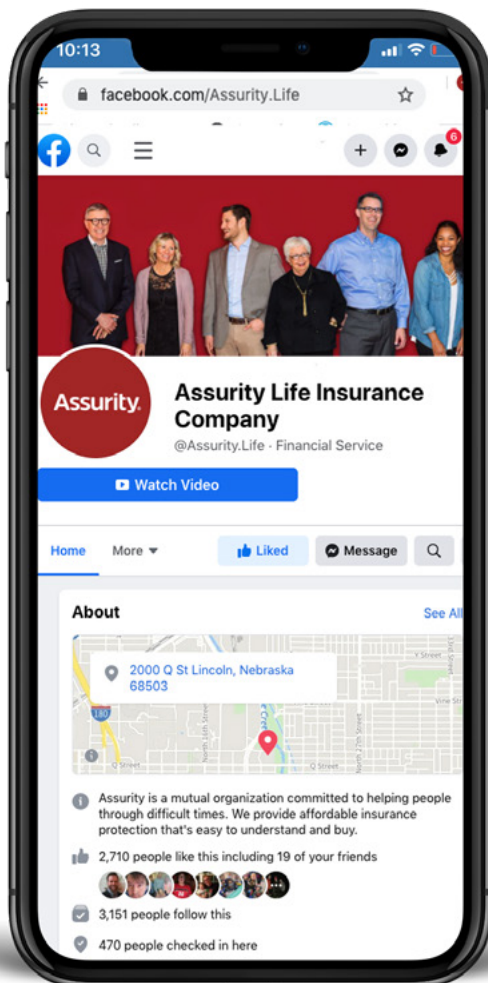


74 percent of users access Facebook daily, so that means opportunities to both share messages and listen to your network.⁶

Ideal use:

- ✓ **Find middle-market prospects** who are raising families (30–59) or approaching retirement (60+)
- ✓ **Look for posts about life events** (getting married, buying a home, having a baby, a child’s graduation, a new job) that you can use to start conversations about insurance or recruitment
- ✓ **Grow your reputation** and network by posting valuable content for clients and prospects

Optimize your Facebook page in 5 steps

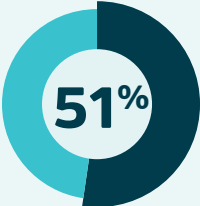


1. **Fill out your profile** as completely as possible, including photo, description and up-to-date information
2. **Make sure to use the “About us” section** to give potential clients and recruits a concise description of who you are and what you do – make sure to link your website as well
3. **Include your contact information**, specifically phone and email, so you can be reached easily
4. **Add a call-to-action button** like “Contact us” to your page
5. **Choose a custom web address** (facebook.com/[Your business name here]) so it’s easier for you to be found

Opportunities by platform



LinkedIn trades a large user base for a focused group of users. The world's premier professional networking site is the best option for connecting with white-collar prospects and clients.



51% of Americans with a college education are on the site, making it easy to connect with college-educated prospects.⁷

Small business owners are likely to have LinkedIn profiles for themselves or their businesses.



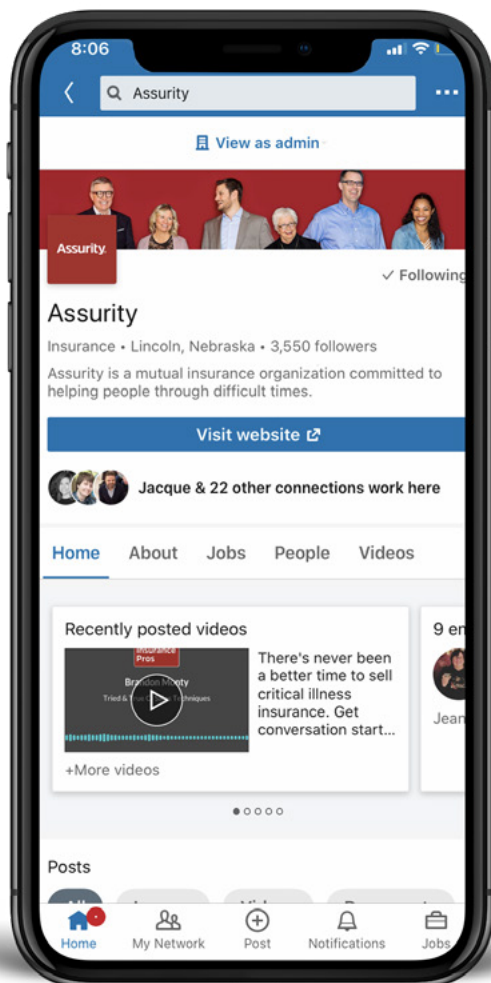
over 50%

of job seekers use professional social networks to look for a job, making LinkedIn one of the best places for recruiting.⁷

Ideal use:

- ☑ **Identify and recruit top talent** for your brokerage through search
- ☑ **Build relationships and trust** with professionals and other sources who might refer recruits or clients
- ☑ **Generate leads** for business owners or educated prospects

Optimize your LinkedIn page in 6 steps



1. **Update your photo** with a high-quality image, and make sure not to leave it blank
2. **Change your headline** to let customers and recruits know what you do and how, instead of simply a title
3. **Ask existing customers and employees** to review your business to add credibility
4. **Post content to populate your page**, especially content with eye-catching visuals
5. **Include a concise summary** of your business, including any goals or accolades, and be sure to add a call-to-action at the end
6. **Join LinkedIn groups** and industry discussions

Opportunities by platform



YouTube is the undisputed leader of online video, with Facebook in a distant second place. If you want to help establish yourself as an expert and **get discovered online using video content**, this is the place for you.

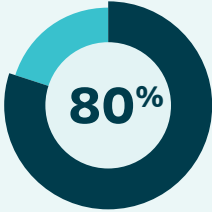
2 billion+
people use YouTube each month.⁸



18 – 35 average age of viewers² great for recruiting new talent or reaching consumers.



The **2nd largest search engine** in the world is YouTube.

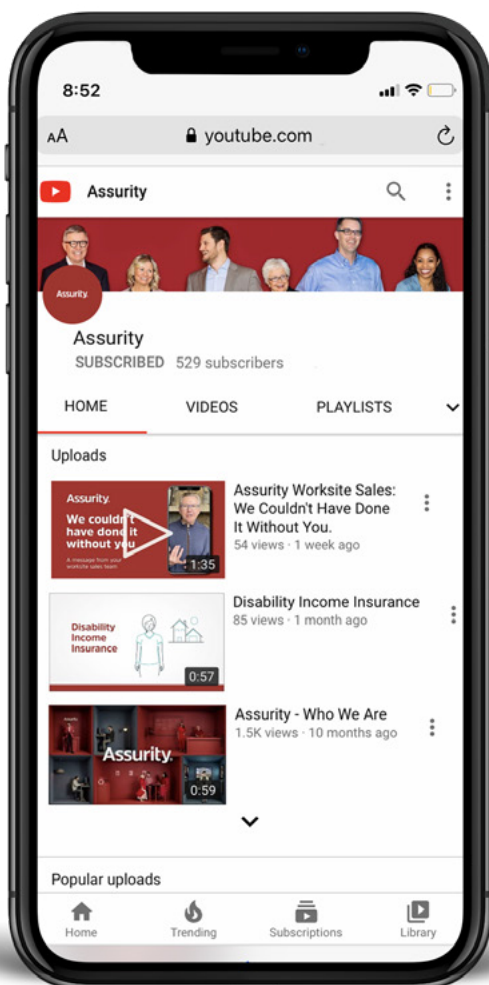


80%
of people use both video and online search when researching products to buy.⁹

Ideal use:

- ✔ **Create or host educational content** like webinars and training videos
- ✔ **Engage your audience by asking questions** and interacting with viewers in the comments
- ✔ **Consistently and frequently post video content** and cross-promote on other channels to aid discovery by prospects and recruits alike

Optimize your YouTube page in 5 steps



1. **Write a description** of the content you produce or host so viewers know what to expect
2. **Organize existing videos into playlists** so they can be easily sorted
3. **Add relevant tags** to your videos to boost their search placement
4. **Upload custom thumbnails** instead of using the pre-generated options
5. **Post on a consistent basis** to grow viewership

Keys to social selling



Clients want to **build relationships**. If there's only one thing you take away from this guide, let it be this:

Social media is a way for you to sell your expertise and trustworthiness, not your products.

The easiest way to build relationships is two-way communication and engagement. Show that you're trustworthy and you'll be the first person your connections call when they think "insurance."



Listen closely

Keep an ear to the ground and listen to what your audience says so you can better understand their goals and challenges. Answer any questions you have expertise in.



Interact regularly

Interact with your network about more than insurance. Post family updates, ask for recommendations and engage by liking, commenting and sharing on others' posts.



Post valuable content

You don't have to spend time writing content. If you read a useful or interesting study, article or blog post, share it. Build trust and start conversations by sharing things that interest or help your network.



Maintain connections

Connect with people you meet to continue the conversation — adding someone on LinkedIn isn't the end goal, it's the beginning of a fruitful professional relationship.



Ask questions

Ask questions, educate potential clients and provide value by sharing useful information that goes beyond insurance. A question is the easiest way to engage your audience and begin a dialogue.

Prospecting and engagement



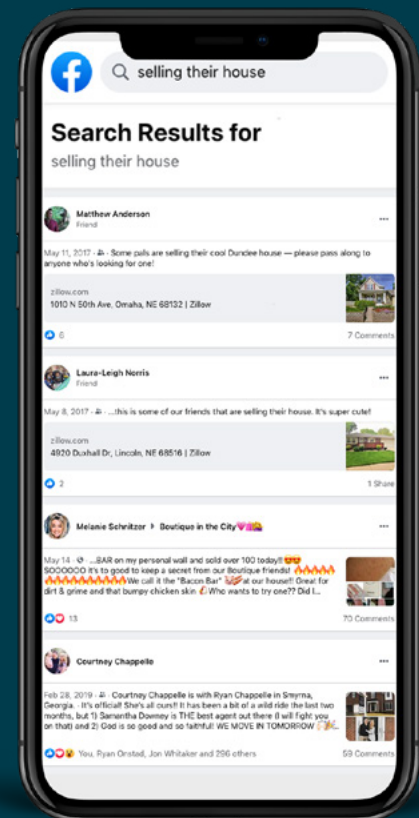
Case study: Social Listening

Tony sees an acquaintance on Facebook ask for a recommendation for a real estate agent. So he replies to the post and shares the name of a local realtor he's worked with in the past. Tony knows that it's small, genuine interactions like these that can help him build relationships and trust.

Tony knows his post is just an introduction, he makes a note to watch for news of a home purchase. A few months later, when Tony sees they bought a home, he sends a message the acquaintance:

Message from Tony

Hey, congratulations on your new home – Cassandra is a great realtor. I'd love to sit down and talk more about your financial goals, now that you're settling down.



Key takeaways

- ☑ **Providing value**, in this case a recommendation, is a great way to develop and deepen relationships with people who might be potential clients, recruits or sources of referrals.
- ☑ People would rather message you on Facebook than call or email. It's an ideal place to start a conversation, but be sure to take the discussion offline at a natural point later.
- ☑ People know when you're selling something – be sure to look for opportunities to engage genuinely and focus on the person – and the relationship – first.

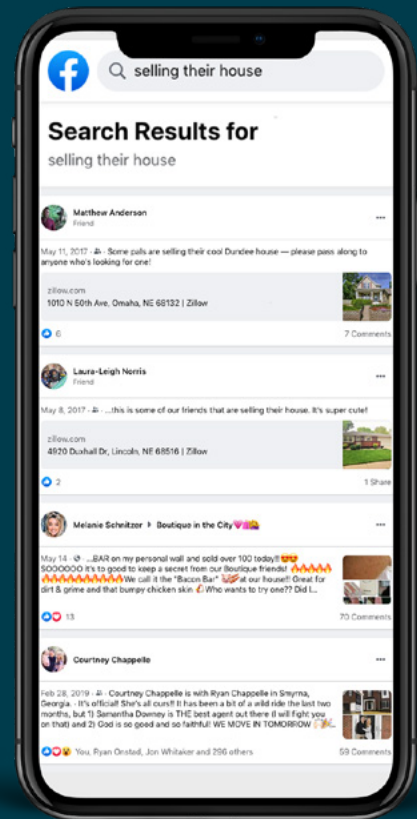
Case study: Search for prospecting

Agent Amanda does a search on Facebook for life events that are common insurance-buying triggers: such as ‘wedding,’ ‘new baby,’ ‘new house,’ and ‘new job.’ She immediately finds several friends who are going through important life changes. She comments on their recent posts with her congratulations, and makes a note to follow up later.

Comment from Amanda

Congratulations on the new addition to your family!

After a few messages and a few weeks, Amanda takes her initial message from a warm handshake down the path to converting these new parents to new clients.



Key takeaways

- ✓ **Prospects like these have clear needs** could mean a lot of new business – and they can be found without leaving your desk.
- ✓ **Using the search functionality of Facebook** lets you see more posts than you would otherwise, specifically posts you use to start a conversation and build relationships.
- ✓ **Keep the prospect’s circumstances at the front of your mind and tailor your messages to them.** A personalized note will go much further than a copy-pasted form message.

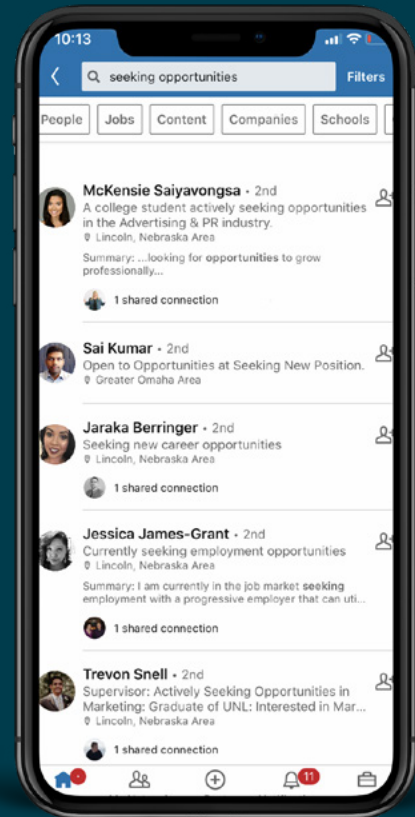
Case study: Search for recruiting

Alan, a brokerage manager, searches on LinkedIn for phrases like “seeking opportunity” that indicate people are in the job market, and sees shared connections and groups using those words. After deciding on some good matches, he sends candidates a message:

Message from Alan

Hello, my name is Alan and I see we have a shared connection (insert name). He thought you'd be a great candidate for a position we have open at Partners Brokerage. Do you have time this week for a call to talk more about the position?

After several interviews, Alan brings on a great new recruit to his business.



Key takeaways

- ✓ **Professional networking sites like LinkedIn are a good place to find professional, quality hires** – and it’s easy to get an idea of who they are by looking at their profile and their connections.
- ✓ **Connections are key** – in fact, job candidates are 46 percent more likely to accept a message when they’re connected to someone you’re connected to .
- ✓ **Looking online is one of the best ways to find candidates** who would otherwise never see your job listings – your talent pool can increase up to 10 times when you recruit through a network⁹.

Best practices



No matter which platforms you choose to spend your time on, you can maximize your efforts with these best practices. Consider the following when polishing your social media profiles:



Make it personal

Your social media shouldn't be all business, you're selling yourself here. Feel free to ask for recommendations for a plumber or post about a proud life moment; you'll be more trustworthy if people can see you're a real human and not a walking advertisement.



Start a conversation

It's great to post and reply, but if you want to invite dialogue if you can. Try adding a "Message me!" or "Send me an email if you've got questions," to your posts to continue conversations move closer to a sale.



Stay friendly and professional

It may sound obvious, but a single post in poor taste can stymie the rest of your social media efforts. Don't post anything that your network could find objectionable and make sure to keep your cool online.



Cross-promote often

To supercharge your social media results, try linking to your website from your social media posts, or linking to your social media profiles from your website. The more engagement a potential client has with you, the better. Keep in mind that these links should feel natural, not forced into the post.



Keep it short and sweet

Nobody wants to read a novel on Facebook, so keep your posts to a reasonable length. Ideally, your connections should be able to read the whole post without clicking “Read more.”



Add eye-catching visuals

Images and video grab your audience’s attention and make it more likely that they’ll click on or read your post.



Be the expert

Your clients and prospects see the helpful information you share, and it keeps you in their mind as an insurance pro. To keep their trust, be sure to take the time to answer their questions as truthfully and professionally as you can. Even helping them with customer service needs can keep you in their minds as a trusted advisor.



Be careful what you share

In the era of “fake news,” sharing something less-than-accurate can do serious damage to your reputation. Curate the content that you share and be sure to carefully vet what you put online before you post.



Use content from others

You don’t have to come up with every post yourself, that can be a lot of work. Instead, mix in some approved content or posts from industry sources like Life Happens, LIMRA or Assurity. Don’t rely too heavily on other’s content, though, and be sure to give credit when you share something that’s not yours.



Educate your network

When it comes to insurance, you’re the expert! You’ll build up your network more quickly by providing content that educates viewers and provides real value to their life.

Tips for starting conversations



It's easier than you think to ask for introductions and referrals, and to take conversations offline. By following these guidelines, you can become a pro at networking on social media.

Asking for a referral

- ☑ **The best time to ask for referrals is when talking to a satisfied client.** If they're happy with the service they've received, they're far likelier to pass your name to their friends and family.
- ☑ **Using relevant topics like life events, trends or a shared interest/affinity** can be a good segue into asking for a referral. For instance, asking a lawyer client to refer other lawyers has a better chance of success.
- ☑ **Referrals are a two-way street.** If you've referred your clients to someone before, using a reciprocal approach is a good choice.

Hey Dave, I'm glad to hear that you're doing well. I've really enjoyed getting to know you and your situation over the last years, and right now I actually have some openings to take on new clients. Is there anyone you know that could benefit from the same services? Meeting the friends and family of my clients is always a pleasure, and I'd love to help them in a professional capacity as well."

Asking for an introduction

- ☑ **Make sure you know whomever you're asking fairly well** – you don't want to approach strangers and ask for an introduction to someone they know.
- ☑ **Let them know why you're looking to meet their connection**, and how you think you can help them. People are often eager to help if you're bringing value to others they know.
- ☑ **Before you ask for an introduction**, be sure that whomever you're looking to meet is **a good fit for your business**. The last thing you want is to make an introduction and then turn them away.

Hey there Kathy, I saw you're connected to [prospect name] on LinkedIn. I think I can help them with [insert brief message about how you can help], and was hoping you could make an introduction. Would you mind putting me in contact with them?"

Taking the conversation offline

- ☑ **Explain why you think the prospect would be a good fit**, set up a concrete time to talk over the phone or in person.
- ☑ **Get directly to the point** – prospects know whether they're interested, and pursuing a sale that won't happen is a waste of your time and theirs.
- ☑ **Don't move too quickly**, you should take this step once you've built a solid rapport and know that the prospect has interest in your services.

It's great to hear that you're looking to protect your financial future, especially now that you've closed on your new home. I'd love to have a chance to explain more about what your options are – would there be a good time for me to call you next week?"

Tools for success



Looking for easy posts? We have five social media kits with pre-made posts you can share. Just copy and paste for ready-made content about disability income insurance, critical illness insurance, life insurance, prospecting or recruiting.

Check them out here:



Disability Income



Life Events



Critical Illness



Recruiting



Life Insurance



Content Calendar Template

Social post checklist

Here's a handy checklist you can print out and keep by your computer. Every time you make a social media post, make sure you check it against these tips:

- Is this post selling a product or building my profile?
- Does this post provide value to my audience?
- Is this post friendly and professional?
- Have I included a photo or video?
- Can I link to my website with this post?
- Is it short and easy to read?
- Is the information I'm sharing accurate?



If you can answer all of the above confidently, go ahead and post – congratulations!



Why we're different.

Mutual strength

For over 130 years, our financial strength has helped people support one another through difficult times.

A force for good

As a Certified B Corporation, we work toward positive impacts for employees, communities and the environment.



Personal service

Get the customer service you need from real, responsive and efficient people in our Lincoln, Nebraska headquarters.

Customer Service

800-276-7619
Ext. 4264

Find out more

[assurity.com](https://www.assurity.com)

1. Pew Research, Social Media Fact Sheet, 2019
2. Sprout Social, Social Selling Statistics, 2019
3. McKinsey and Company, How Insurance Can Prepare for the Next Distribution Model, 2020
4. Global Web Index, Social Media by Generation, 2019
5. Facebook, Want to reach your customers? Strike up a conversation, 2019
6. Pew Research, Social Media Use in 2018, 2019
7. LinkedIn, The Ultimate List of Hiring Stats, 2018
8. YouTube, YouTube for Press, 2020
9. Google, Search to video and back again, 2019

FOR PRODUCER USE ONLY. NOT FOR USE WITH CONSUMERS. NOT AVAILABLE IN NEW YORK.

Assurity is a marketing name for the mutual holding company Assurity Group, Inc. and its subsidiaries. Those subsidiaries include but are not limited to: Assurity Life Insurance Company and Assurity Life Insurance Company of New York. Insurance products and services are offered by Assurity Life Insurance Company in all states except New York. In New York, insurance products and services are offered by Assurity Life Insurance Company of New York, Albany, NY. Product availability, features and rates may vary by state.

